

Occupational and Professional Licensing
District of Columbia Board of Accountancy
1100 4th Street, SW Suite 400
Washington, DC 20024



Meeting Minutes
August 2, 2024

*****This meeting is governed by the Open Meetings Act. Please address any questions or complaints arising under this meeting to the Office of Open Government at opengovoffice@dc.gov***

The District of Columbia Board of Accountancy (Board) held its regularly scheduled meeting on Friday, August 2, 2024. This was a virtual meeting.

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The meeting was called to order at 9:06 a.m. by Board Chair, Robert Todero, and attendance taken.

Board Members Present: Robert Todero, Dr. Joseph Drew, Bridgett Gagne, and Antonia Browning Smiley joined 9:40 am.

The Chair recognized Angela Avant and thanked her for her service on the Board and to the residents of the District of Columbia.

Board Members Absent: None

Staff Present: Angela Meggett-Strudwick, Board Administrator; Leon Lewis, Program Manager; Jacqueline Noisette, Deputy Associate Administrator; Shakira Richardson, Program Manager; Kathy Thomas, Education Liaison Specialist.

Legal Counsel: Justin Orrison, Office of the General Counsel; April Randall, Legislative and Public Affairs Officer joined 9:43 am.

Public Consumers Present: Kari Bedell, Greater Washington Society of CPAs (GWCPAs), Paul Thrasher, GWCPAs

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Agenda Item: Comments from the Public:

Ms. Bedell stated that the (GWSCPAs) is aware of the vacancy on the Board, so they are currently reaching out to members in the city to see if there are any interested candidates. She also inquired about the candidate qualifications for the vacant seat. Justin Orrison, General Counsel answered her question with the code that addresses the qualifications, DC code section 47-2853.07.

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Agenda Item: New Business

Eastern Regional Meeting 2024 Summary Report - Joseph Drew summarized the events of the conference for the board. They discussed many important issues during the conference, but the biggest change is NASBA's new Executive Director, Dan Dustin. They also discussed the pipeline issues, legislative challenges to substantial equivalency, PE firms and ownership structure of firms, and the effects dealing with 150 credit hour pathway. He provided an extensive report summary of the conference topics to the DC Board at their request.

Summer Youth Program on Careers Summary Report - Kathy Thomas, DLCP Education Liaison Specialist reported on the event. DLCP along with OPLA hosted a youth summer program career day, highlighting five professional licensing boards and commissions that are represented under Tiffany Crow, DLCP's director. They were happy to have the Board of Accountancy to be a part of the event. Ms. Thomas thanked Chairman Todero for jumping in, identifying and sending them two awesome presenters, Makia Robertson and Camille Heinz, who were both employed by KPMG. They were natural, dynamic speakers who spoke candidly about the profession. The young ladies spoke to the summer youth about what is required to be in the profession of accountancy, testing requirements, the current trends in the accountancy field, what they liked or disliked about the profession. They were informed, energetic and engaging. The youth really related to these young ladies.

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Agenda Item: Acceptance of Draft Minutes

Upon motion duly made at 10:09 a.m. by board member, Bridgett Gagne, and properly seconded by board member, Antonia Browning Smiley, the Board unanimously voted to approve the May 03, 2024, draft board meeting minutes.

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Agenda Items: 2024 NASBA Conferences/Meetings & Events Calendar

Upcoming Events

[117th NASBA Annual Meeting](#)

October 27 - 30, 2024 | Orlando, FL

NASBA Annual Meeting— All board members present plan to attend, Robert Todero, Chairman, Bridgett Gagne, Board Member, Antonia Browning Smiley, Board Member and Dr. Joseph Drew, Consumer Member. DC Board Staff may attend but are undecided if they will attend as of the meeting date.

[GWSB - Department of Accountancy annual CPA Exam Information Session](#)

Wednesday, September 18, 2024, from 3:30 to 6:30 pm at Duques 150 Crain Center

Presentation Time; 4:05 – 4:40 pm DC Board of Accountancy

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“Reserve the date”

October 27 - 30, 2024, NASBA Annual Meeting, Orlando FL

September 18, 2024, from 3:30 to 6:30 pm, GWSB - Department of Accountancy annual CPA Exam Information Session, Washington DC

Proposed 2024 Board Meeting Dates – The scheduled board meeting dates and upcoming conferences as listed.

Board changed the September 6 meeting to September 13, 2024, due to scheduling conflicts.

January (Recess)	February 2	March (Recess)	April (Recess)
May 3	June (Recess)	July (Cancelled)	August 2
September 13	October (Recess)	November (Recess)	December 6
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Agenda Item: Report - Applications for Licensure

Upon motion duly made at 10:26 a.m. by board member Dr. Joseph Drew, and properly seconded by board member Bridgett Gagne, the Board unanimously voted to approve the list of accountancy applications for licensure, attached hereto and made a part of the August 2, 2024, minutes.

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Agenda Item: Old Business

Complaint Intake Process – Angela Meggett-Strudwick informed the Board that the new process in place was working smoothly. However, it may take a little longer to receive the complaints. The Board has received its first report from the Consumer Protection Unit (CPU) to review in the executive session.

Accountancy Board Outreach Efforts – Angela Meggett-Strudwick updated the board to a change in time and a limit of attendees for the GW outreach scheduled for September 18, 2024. See details below:
 George Washington School of Business - Department of Accountancy annual CPA Exam Information Session scheduled for Wednesday, September 18, 2024, from 3:30 to 6:30 pm at Duques 150 Crain Center. DC Board of Accountancy presentation time; 4:05 – 4:40 pm. We are limited to five (5) people because of the small venue, per GW organizer. Kendra Covington will attend to man the DC BOA welcome table. She is not counted in the limited number.

Legislative Progress Update – Justin Orrison and April Randall updated the board on the progress of the proposed rule-making the board adopted for the UAA Model Rule 5-7. We had to make some minor revisions, but the final version is moving forward at this time. We will have a complete update by the September 2024 meeting.

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CE Advisory Committee Update – Bridgett Gagne updated the board on the progress of the Advisory Committee and their process reviewing the documentation along with the DC staff. We are still in process, and it can take up to 90 days or more once we have received everything. Managing expectations of the applicants is very important. We are still laying out parameters for the applicant to follow. Ms. Gagne suggested possibly making an instructional video for the applicants reinstating so they can complete the forms accurately as well as adding more members to the committee from the public.

EXECUTIVE SESSION

Upon motion duly made by board member Bridgett Gagne, and properly seconded by board member Antonia Browning Smiley, the board unanimously agreed by roll call to enter closed session at 10:41 a.m. pursuant to the authority of D.C. Official Code Section 2-575(b) (4) (A) to seek the advice of counsel, D.C. Official Code Section 2-575(b) (9) to discuss disciplinary matters, complaints, technical applications, and D.C. Official Code Section 2-775(b)(13) to deliberate upon a decision in an adjudication action or proceeding.

Agenda Item: Technical Review:

- *Complaint Review*
- *Reinstatement Review*

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Agenda Item: Legal Matters:

- *None*

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The following actions were taken due to the discussion during the closed session:

Upon a motion duly made at 12:11 p.m. by board member Bridgett Gagne, and properly seconded by board member Antonia Browning Smiley, the Board unanimously voted to accept the following legal recommendations:

1. In the matter of Alfred Pickett, H & R Block – Dismiss complaint, no action.

Upon a motion duly made at 12:13 p.m. by board member Bridgett Gagne, and properly seconded by board member Antonia Browning Smiley, the Board unanimously voted to accept the following legal recommendations:

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2. In the matter of Honkamp Krueger, PC – Approve application for firm licensure.

Upon a motion duly made at 12:14 p.m. by board member Bridgett Gagne, and properly seconded by board member Antonia Browning Smiley, the Board unanimously voted to accept the following legal recommendations:

3. In the matter of Stuart Becker – Approve application for licensure.
4. In the matter of Cherry Bekaert LLP – Formerly reprimand and impose a civil fine of \$3,500.00 and offer a consent order to resolve the disciplinary action. Reinstatement is contingent on paying the fine.

Upon a motion duly made at 12:15 p.m. by board member Bridgett Gagne, and properly seconded by board member Antonia Browning Smiley, the Board voted to accept the following legal recommendations, Joseph Drew abstained:

5. In the matter of Roberts & Associates, CPA – Issue a civil fine in the amount of \$5,000.00 against the firm for practicing without a license; and, for any other business licensing and registration issues of violations of law to refer back to the district government to pursue as they deem necessary; and, to issue a consent order.

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Adjourn

Upon motion duly made at 12:17 p.m. by board member Bridgett Gagne, and properly seconded by board member Dr. Joseph Drew, the Board unanimously voted to adjourn.

The next scheduled meeting of the Board of Accountancy will be September 13, 2024, call in/virtual.

Respectfully submitted,

Robert Todero, Chair

Date

Recorder: Angela Meggett-Strudwick, Board Administrator